

## WHAT IS CLAIMED IS:

1. A collaborative process management method, comprising the steps of:

identifying agents;

determining environmental factors;

assessing the agents in view of the environmental factors;

creating an environment in which the agents can communicate with one another;

embedding a process in the environment;

performing the process; and

facilitating collaboration among the agents during the process performing step.

2. The method of claim 1, wherein the process is conducted via a web browser.

3. The method of claim 1, further comprising employing the internet for the step of facilitating collaboration.

4. The method of claim 1, wherein the agents comprise at least one of a person, voicemail, email, printed media, telephone, correspondence, a computer system, and the internet.

5. The method of claim 1, wherein the environmental factors comprise at least one of skill and knowledge, psychology, interaction between agents, relationships between agents, corporate culture, and human communication interaction.

6. The method of claim 1, wherein the environment comprises at least one of an account planning process, a technical architecture, customer information, a knowledgebase, collaboration, agents, a corporate process and an action item.

7. The method of claim 1, wherein collaboration comprises generating action items.

8. The method of claim 1, wherein collaboration comprises changing the process.

9. The method of claim 1, further comprising managing team members.

10. The method of claim 1, further comprising managing action items.

11. The method of claim 1, further comprising identifying new opportunities.

12. The method of claim 1, further comprising performing work offline and subsequently synchronizing when online.

13. The method of claim 1, further comprising interacting with a knowledgebase.

14. The method of claim 1, further comprising disseminating knowledge that was previously saved.

15. The method of claim 1, further comprising managing team goals.

16. A method of executing collaborative process management, comprising the steps of:  
assessing agents and environmental factors;  
creating an online environment that promotes collaboration among the agents in view of  
the environmental factors;  
embedding a process having a plurality of steps in the online environment;  
offering an opportunity to the agents within the online environment to collaborate with  
respect to any one of the steps of the process; and  
modifying the process in view of proposals resulting from collaboration among the  
agents.

17. The method of claim 16, further comprising offering to agents access to a  
knowledgebase.

18. The method of claim 17, wherein the knowledgebase comprises cases studies.

19. The method of claim 16, further comprising employing templates to promote  
collaboration.

20. The method of claim 16, wherein the step of offering an opportunity to the agents  
within the online environment to collaborate comprises providing access to at least one of a  
messaging system and an action item list.

21. The method of claim 16, wherein the process comprises strategic account planning.

22. The method of claim 16, further comprising:

acting on action items developed as a result of collaboration;

learning new skills via a knowledgebase; and

identifying new opportunities developed as a result of collaboration.

23. The method of claim 16, wherein the online environment is established over the internet.

24. The method of claim 23, wherein the online environment is accessible via a web browser.

25. The method of claim 16, wherein the agents comprise at least one of a person, voicemail, email, printed media, telephone, correspondence, a computer system, and the internet.

26. The method of claim 16, wherein the environmental factors comprise at least one of skill and knowledge, psychology, interaction between agents, relationships between agents, corporate culture, and human communication interaction.

27. The method of claim 16, wherein the environment comprises at least one of an account planning process, a technical architecture, customer information, a knowledgebase, collaboration, agents, a corporate process and an action item.

28. A system for implementing collaborative process management, comprising:  
a first domain comprising modules representative of a process;  
a second domain comprising forms and a data abstraction layer; and  
a third domain comprising a transaction framework and being connected to both the first domain and the second domain,  
wherein first, second and third domains are in communication with each other such that collaboration around selected process steps is promoted.

29. The system of claim 28, wherein the process is account planning.

30. The system of claim 29, wherein first domain comprises at least one of an account user management module, an account plan structure handling module and a permission module.

31. The system of claim 28, wherein the second domain comprises templates.

32. The system of claim 28, further comprising an attachment module.

33. The system of claim 28, further comprising a discussion module.

34. The system of claim 28, further comprising an action item module.

35. The system of claim 28, wherein users access at least portions of the system via a browser.

36. The system of claim 28, wherein first domain and second domain are operable together to promote collaboration among agents.

37. The system of claim 28, wherein the domains are bound via software.

38. The system of claim 28, further comprising a knowledgebase that is accessible to users.

39. A system for encouraging collaboration among agents in a process, the system comprising:

means for identifying agents;

means for determining environmental factors;

means for assessing the agents in view of the environmental factors;

means for creating an environment in which the agents can communicate with one another;

means for embedding a process in the environment;

means for performing the process; and

means for facilitating collaboration among the agents during the process performing step.

40. The system of claim 39, wherein the process is conducted via a web browser.

41. The system of claim 39, wherein the internet is employed to facilitate the collaboration.

42. The system of claim 39, wherein the agents comprise at least one of a person, voicemail, email, printed media, telephone, correspondence, a computer system, and the internet.

43. The system of claim 39, wherein the environmental factors comprise at least one of skill and knowledge, psychology, interaction between agents, relationships between agents, corporate culture, and human communication interaction.

44. The system of claim 39, wherein the environment comprises at least one of an account planning process, a technical architecture, customer information, a knowledgebase, collaboration, agents, a corporate process and an action item.

45. The system of claim 39, further comprising an action item module.

46. The system of claim 45, wherein the system offers access to the action item module during the performance of steps in the process.

47. The system of claim 39, further comprising means for synchronizing offline and online users.

48. The system of claim 39, wherein the process is strategic account planning.

49. The system of claim 39, wherein the system is operable from at least one server.

50. The system of claim 39, wherein the server is connected to the internet.